

Sharing EstiPC Projects and Data using a Cloud Service

This guide describes how to share EstiPC Projects and Data using a Cloud Service.

If you work in a networked office with a File Server or NAS (network attached storage) Drive you'll probably want to use it for sharing Projects and Data instead. Please see the guide [Sharing EstiPC Projects and Data using a Server or NAS Drive](#) for more information.

If you're using a Cloud Service to share Projects and Data between a mix of Windows PCs and Apple Macs, also have a look at the EstiMac version of this guide [Sharing EstiMac Projects and Data using a Cloud Service](#).

If you're already using a Cloud Service to share Projects and Data and just want to add another computer then some of the following information and instructions will not be relevant. In this case you can skip the section marked **(NEW INSTALLATION ONLY)**.

Sharing Projects and Data

If you're working in a team of colleagues it's a good idea to share your EstiPC Projects and EstiPC Data so that...

- Projects are available to the whole team.
- Codes, Suppliers Data, Delivery Addresses and Lines Data added or updated by one team member are available to everyone else.
- Order Number and Invoice Number sequences are shared between all projects and all team members.
- The File / Open Order and File / Open Invoice menus present orders and invoices from all projects from all team members.

This guide describes how to use a cloud service to achieve this.

What is a Cloud Service?

Cloud Services that can be used with EstiPC include...

- **Dropbox** • **Google Drive** • **Microsoft OneDrive**

Each service uses a 'cloud folder' on your computer where you can add sub-folders and store files. A background utility program on your computer synchronises everything within your cloud folder to a remote 'cloud server' via the internet. Any changes you make to files and folders in the cloud folder on your computer are automatically copied to the cloud server by the background utility program. Your folders and files are kept separate and secure on the cloud server in a password-protected user account.

More than one computer can be linked to your folders and files on the cloud server. Changes made on one computer are then synchronised to the cloud server then synchronised back to the other computers. This means that changes to folders and files within the cloud folder on one computer appear automatically in the cloud folders on the other computers.

The cloud services also include several backup features that allow you to restore files that have been modified or deleted.

IT Support

If you're not entirely confident about managing files and folders using a Cloud Service, or if you have any trouble understanding this guide, then we recommend you use an IT Support company.

For a list of suitable companies, please go to www.estipc.com/contact

Working Offline and Synchronisation Problems - BEWARE!

Synchronisation problems can occur when you're using a cloud service, meaning that changes you make to your projects can be lost. The best way of avoiding these problems is to always stick to the following rules...

- **Close projects when you're not working on them**

It's important to realise that projects stay open when your computer goes into sleep or standby mode. If you're using a laptop, projects stay open when you close the lid. If projects are open on your computer, your colleagues will not be able to open them. If you won't be using a project for a while, close it. Never leave projects open overnight.

- **Don't work on projects when you're offline or your internet connection is poor**

The cloud service will not work while you're not on a reliable connection to the internet. If you make changes to a project while working offline, and another colleague also makes changes before you go back online, one of you will lose your work. Many hours of working may then need to be repeated. If you're offline, don't use EstiPC!

- **Keep watching the cloud service status icon**

The cloud service background utility program, that synchronises everything within your cloud folder to a remote 'cloud server' via the internet, appears as a little icon towards in the system tray at the bottom right of your screen.



Dropbox, Google Drive and Microsoft One Drive service status icons.

These utilities can sometimes stop working or not restart automatically after restarting your computer. The icon may be missing or shown greyed out or with a warning badge. If that happens your projects and data won't be synchronised with your colleagues. Get into the habit of regularly checking your cloud service status icon. If it's not working correctly, don't use EstiPC!

See the section on [Conflicted Copies](#) at the end of this guide for details of what can go wrong if you work offline.

Installing the Cloud Service

- **Dropbox**

Download from www.dropbox.com/downloading. For help, see www.dropbox.com/help

- **Google Drive**

Download from www.google.com/drive/download. For help, see support.google.com/drive

- **Microsoft OneDrive**

Download from onedrive.live.com/about/download. For help, see onedrive.live.com/about/support

Once the cloud service has been installed, you'll see a link to **Dropbox**, **Google Drive** or **OneDrive** in the left side panel of Windows File Explorer. If you're using Dropbox Business the business name will be shown in brackets.

If you've already installed and used one of these cloud services you can use it for EstiPC too. You don't need to re-install.

It's simplest to use the same user account (typically specified as an email address) on all the computers. When you're setting up a second or subsequent computer, enter the same user account details as the first computer rather than creating more separate accounts. If you do need to use separate accounts you'll need to share specific folders. See the following section [Checking the Cloud Service Account](#) for details.

If you've not used a cloud service before and have no other preference we recommend Dropbox. The basic free version of Dropbox works well with EstiPC and can be used to share data and projects between several users. You can always upgrade to Dropbox Pro or Dropbox Business later.

Other cloud services are also available. We know there are problems using LiveDrive with EstiPC so we suggest you avoid using it if possible.

Dropbox and Google Drive usually show notifications when files on synchronised computers are created, modified or deleted. The 'lock files' that EstiPC automatically creates and deletes can be included in these notifications, which can become annoying. You might prefer to disable these notifications via the Dropbox or Google Drive background utility settings.

Checking the Cloud Service Account

Make sure the cloud service is installed and synchronising properly before you set up EstiPC. To do this, save or copy a file into the cloud folder on your computer then check that the file appears in the cloud folders on all of your colleagues' computers after a few seconds. Any type of file will do. You could use a text file, word processor document, spreadsheet or image file. Just make sure that it appears in the cloud folder of all the computers.

If you've installed the cloud service on each computer, and you're connected to the internet, but files in the cloud folders are not synchronising then you may be using different cloud service user accounts on each computer. If you want to keep using different user accounts you can send an invitation from one computer to the others to share specific folders within your cloud folder. All EstiPC Projects and Data folders will need to be shared. Alternatively, if you're happy for everything in your cloud folder to be shared then you can switch user accounts to one that's used by all your colleagues.

- **Dropbox**
For help on sharing specific folders, have a look at www.dropbox.com/en/help/19
For help on switching user accounts, have a look at www.dropbox.com/en/help/25
- **Google Drive**
For help on sharing specific folders, have a look at support.google.com/drive/answer/2494822
For help on switching user accounts, have a look at support.google.com/drive/answer/2375018
- **Microsoft OneDrive**
For help on sharing specific folders, have a look at support.office.com/en-us/onedrive
For FAQs including help on switching user accounts, have a look at support.office.com/en-us/onedrive

Choosing a Projects Folder in the Cloud Service Folder

There's a Projects Folder setting in EstiPC that specifies the starting point for the **File / Open** and the **File / Save As / New Project** menus.

If you're using a cloud service to share projects between different computers, or if you're working alone and using the cloud service to backup your work, then this Projects Folder setting should be set to your cloud folder or a sub-folder within it.

It's very common already to have a folder structure within your cloud folder to organise your work by categories, years, clients, projects, etc. Various documents, spreadsheets, pictures, drawings, PDFs and other file types may already be stored within this folder structure. You may want to store your EstiPC Projects within this same folder structure too.

Alternatively, you may prefer to have an EstiPC Projects folder within your cloud folder and use it exclusively for storing your EstiPC work. You might still want to set up sub-folders within it for each year, client or project.

There's no right or wrong way of doing this. You just need to decide which arrangement suits you best.

Whichever arrangement to choose, the EstiPC Projects Folder setting should be set to a 'root' or 'base' folder than encloses all the sub-folders containing your EstiPC work. This may be the actual cloud service folder or a folder within it.

If you previously saved projects into the EstiPC Projects folder within your Documents, you'll need to use Windows File Explorer to move them into the folder structure within your cloud folder so they can be shared and backed up.

Moving the EstiPC Data Folder to the Cloud Service Folder

EstiPC Data is information that's shared between all your separate EstiPC Projects. This includes...

- Codes, Suppliers Data, Delivery Addresses and Favourite Lines Data
- Order Number Sequences and Logs
- Invoice Number Sequences and Logs
- Various Settings and Options

When you first install EstiPC this folder is automatically created in your Documents folder.

If you previously used an older version of EstiPC this folder would have been automatically created in your Public Documents folder.

When you set up sharing for the first time you'll need to move the EstiPC Data folder from your Documents or Public Documents to your cloud service folder.

- Open Windows File Explorer and select **Documents** in the left side panel. This may be listed within **Documents** in the **Libraries** or **Favourites** section. You should see the **EstiPC Data** folder in the main Explorer view.
- If the **EstiPC Data** folder is not in your **Documents**, try typing **%public%** in the address navigation box at the top of Explorer, then browse into **Public Documents**. Now you should see the **EstiPC Data** folder in the main Explorer view.
- Click on the **EstiPC Data** folder and drag it on to the cloud folder (**Dropbox**, **Google Drive** or **OneDrive**) in the left side panel.
- Click on the cloud folder (**Dropbox**, **Google Drive** or **OneDrive**) in the left side panel. Check that the **EstiPC Data** folder is now shown in the main Explorer view. Drag it into a sub-folder within the cloud folder if you prefer.

(NEW INSTALLATION ONLY)

You only need to do this if you're setting up sharing for the first time, **not if you're adding an extra computer**.

If you've been using EstiPC on several computers separately before setting up sharing then move the EstiPC Data folder to the cloud folder on only one of the computers. Use the computer where you've done most of the work so far. It's not possible to merge EstiPC Data from several computers.

The cloud service will automatically synchronise the folder on the other computers. Don't move or copy the EstiPC Data folders from the other computers to the cloud folder yourself.

If you browse into the EstiPC Data folder you'll find some or all of the following files...

- Codes.edx • Suppliers.edx • Deliveries.edx • Lines.edx
- NextOrder.txt • OrderLog.tsv • InvoiceLog.tsv • EstiPC-Company.ini

Turning Off the Download-On-Demand Options

All of the cloud services include download-on-demand features designed to save space on your computer hard drive. Copies of large files and folders are kept on the cloud server and only downloaded when needed.

EstiPC Project and Data files are relatively small so don't benefit from these download-on-demand features. The project locking features, which prevent content loss when more than one user works on a project at the same time, are less reliable when download-on-demand is used. The sharing of suppliers, codes and other data, order and invoice number sequencing can also be less reliable.

Download-on-demand should be turned off for the EstiPC Data folder, the EstiPC Projects folder and any other folders where EstiPC Projects are stored. It should also be turned off for folders containing image files used in EstiPC projects.

To turn off download-on-demand, open Windows File Explorer, browse to locate each of the EstiPC folders then...

- **Dropbox**
Right-click on each folder, click on **Smart Sync** then click to select the **Local** option
- **Google Drive**
Right-click on each folder, click on **Offline Access** then click to select the **Available Offline** option
- **Microsoft OneDrive**
Right-click on any folder, click on **Choose OneDrive Folders To Sync** then make sure the EstiPC folders are selected

After turning off download-on-demand, it may take a while for all folders and files to download fully. In Windows File Explorer you should see little green ticks against each folder and file, rather than little blue or white cloud icons.

Remember that even though some of the cloud services imply that turning off download-on-demand lets you work offline, you should never use EstiPC while you're offline.

See the section on [Conflicted Copies](#) at the end of this guide for details of what can go wrong if you work offline.

Selecting the Projects Folder and Data Folder

Open EstiPC then click on the **Tools / Options** menu. If you've not yet changed these settings since installing EstiPC you'll see something like this...

First click on the **upper** Browse button.

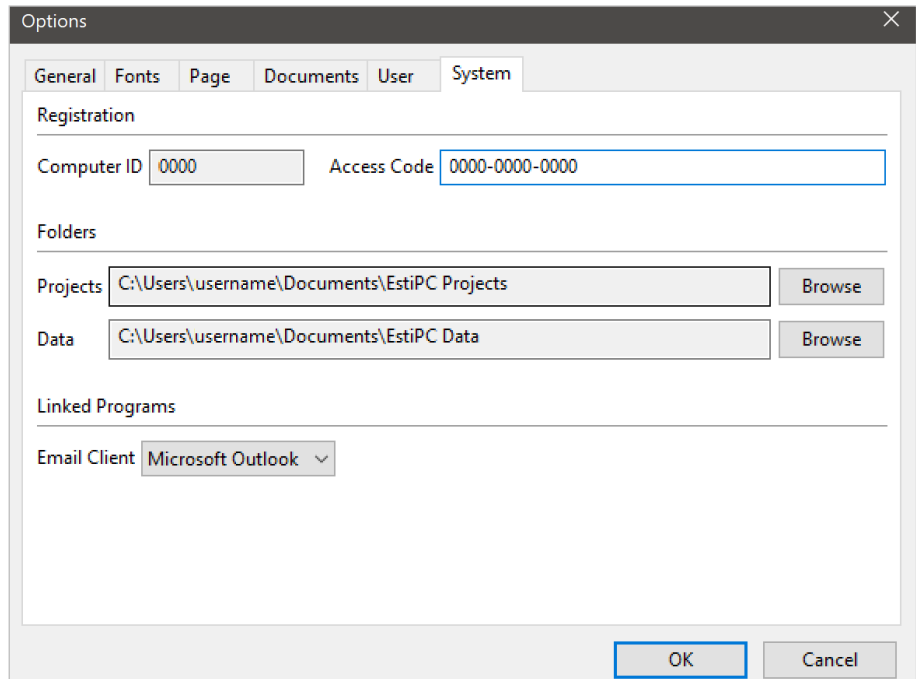
In the folder browser box, click on the cloud folder (**Dropbox, Google Drive or OneDrive**) in the left side panel. If you want to use a subfolder, select it in the main view.

Click the Open or OK button to make the selection.

Now click on the **lower** Browse button.

In the folder browser box, click on the cloud folder (**Dropbox, Google Drive or OneDrive**) in the left side panel then browse and select **EstiPC Data** in the main view.

Click the Open or OK button to select the folder.



Depending on which cloud service you're using, and how you're organising projects, you'll end up with...

Dropbox or Dropbox Pro

Projects	C:\Users\username\Dropbox	or
	C:\Users\username\Dropbox\foldersbase	or
	C:\Users\username\Dropbox\EstiPC Projects	

Data	C:\Users\username\Dropbox\EstiPC Data
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Dropbox Business

Projects	C:\Users\username\Dropbox (companyname)	or
	C:\Users\username\Dropbox (companyname)\foldersbase	or
	C:\Users\username\Dropbox (companyname)\EstiPC Projects	

Data	C:\Users\username\Dropbox (companyname)\EstiPC Data
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Google Drive

Projects	G:\drivename	or
	G:\drivename\foldersbase	or
	G:\drivename\EstiPC Projects	

Data	G:\drivename\EstiPC Data
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Microsoft OneDrive

Projects	C:\Users\username\OneDrive	or
	C:\Users\username\OneDrive\foldersbase	or
	C:\Users\username\OneDrive\EstiPC Projects	

Data	C:\Users\username\OneDrive\EstiPC Data
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Conflicted Copies

If you've been working offline, or if other problems occur with the cloud service, you may see 'conflicted' copies of your files in the EstiPC Projects or EstiPC Data folders.

The different cloud services mark conflicted files as follows...

- **Dropbox**
(computername's conflicted copy YYYY-MM-DD) is appended to the conflicted file name
(computername is your computer's name, YYYY-MM-DD is the date in reverse format)
For further information, have a look at www.dropbox.com/en/help/36
- **Google Drive**
[Conflict] is appended to the conflicted file name
- **Microsoft OneDrive**
-computername is appended to the conflicted file name
(computername is your computer's name)